



**STATE of INDIANA**  
**Department of Administration**

# **eProcurement Training Manual**

## **- Buyer Station -**

for

**Indiana Department of Administration**

*eProcurement Enablement*

## **DISCLAIMERS**

---

MAXIMUS ERP Solutions

Written by MAXIMUS, ERP Solutions Division, March 2003.

This training manual is considered to be proprietary and confidential and may not be reproduced for any reason other than stated below without prior written consent of MAXIMUS, ERP Solutions Division.

### **STATE OF INDIANA**

This training manual is intended only for use when utilizing the PeopleSoft System. The information provided in this training manual does not replace the State statutes, promulgated rules, approved State procedures, or your approved State Agency internal purchasing procedures. If there is a conflict in the information presented in this training manual and authoritative sources, the order of precedence is as follows: 1. State Statutes, 2. Promulgated Rules, 3. State approved procedures, 4. Approved State Agency Internal Purchasing Procedures, 5. PeopleSoft training manual.

### **EXCLUSION**

---

This training manual has been prepared exclusively for Client End-User Training. Information contained within this document may be used by the client for the sole purpose of personnel training. Additional manuals may be reproduced and edited as needed for training purposes ONLY. All other uses are prohibited without prior written consent from MAXIMUS, ERP Solutions Division.

Copyright © 2003 MAXIMUS, ERP Solutions Division, Inc. All Rights Reserved.



# Table of Contents

<a href="#">Overview</a>	4
<a href="#">Buyer Station</a>	5
<a href="#">Managing Purchase Orders</a>	7
<a href="#">Searching</a>	7
<a href="#">Reviewing Results</a>	8
<a href="#">Requisition Expeditor</a>	9
<a href="#">Searching</a>	10
<a href="#">Reviewing Results</a>	10
<a href="#">Quick Sourcer</a>	14
<a href="#">Autosource Parameters</a>	14
<a href="#">Purchase Order Parameters</a>	16
<a href="#">Dispatch Purchase Orders</a>	18
<a href="#">Purchase Order Processes</a>	19
<a href="#">Inquires and Reports</a>	20



**PO Schedule Listings**

Provides purchase order schedule information such as ship to and due date  
Sorted by purchase order date, vendor, or buyer.

**PO To Requisition Xref**

Provides a cross reference between requisitions and the purchase orders  
created from those requisitions.

**PO Item Category Usage**

Provides purchase order item usage information by catalog or vendor.

**Requisition To PO Xref**

Provides information about selected requisitions and the purchase orders that  
were created from them.

**Requisition Costing Summary**

Provides GL business unit, account and department information summarized  
by requisition.

**Requisition Cost Distribution Detail**

Provides requisition cost distribution detail by business unit and date range.

**Catalog Item Usage**

Provides requisition item usage information for the specified catalog.

**Receipt Summary**

Provides receipt summary information.

**Receipt Shipto Detail**

Provides detail on receipt shipto.

.....21

**Approve Change Requests** .....22

**Vendor and Item Catalog** .....23

**Procurement Analytics** .....24

## OVERVIEW

eProcurement is a web based application that is part of the PeopleSoft Financial Supply Chain Management enterprise solutions package. It encompasses a single point of entry for all the procurement activities and supporting business functions for the State of Indiana.

In this training manual we will look at the buyer specific functions available through eProcurement. The eProcurement buyer station logically groups all purchasing functions in a single homepage, hence allowing a professional buyer to complete all their tasks from a central location.

Note that whilst the eProcurement buyer station provides additional useful utilities to help professional buyers, it **does not replace core purchasing functionality**. Rather it provides links to these core purchasing functions.

In this training material we will cover what is new to eProcurement (and what remains in core purchasing), how to navigate around and use the utilities of the buyer station. Again please note that this training manual **does not** cover the specifics of core purchasing functionality. Please refer to the Purchasing and Request for Quotes training manuals for details of core purchasing functions.

---

NOTE: Throughout this manual screen shots are included to illustrate and describe the data fields that must be entered for specific transactions. Not all pages or fields on a page will be explained. This manual focuses on those pages and fields that are required for data entry for the State of Indiana.

---

---

NOTE: Access to the functions on the eProcurement Home Page is dependent on a user's security privileges. Please see your system administrator if you have any questions.

---

## BUYER STATION

Navigation: [Home](#)> [eProcurement](#)>[eProcurement Home](#)>[Buyer Station](#)

The eProcurement Buyer Station logically groups all purchasing functions in a single homepage, hence allowing a professional buyer to complete all their tasks from a central location. It can be accessed from the navigation above.



[Buyer Station](#)

Create, edit, or approve purchase orders, source requisitions and process change requests

Click on the

icon from the eProcurement Home page.


### Buyer Station




[Manage Purchase Orders](#)  
Create new purchase orders, edit existing orders, or create change orders



[Requisition Expediter](#)  
Manually assign a vendor to a requisition and create a purchase order



[Quick Sourcer](#)  
Automatically assign a vendor to a requisition and source from inventory or create a purchase order




[Dispatch Purchase Orders](#)  
Dispatch and publish purchase orders



[Approve Change Requests](#)  
Review and approve change requests submitted by requesters




[Purchase Order Processes](#)  
Requisition sourcing and purchase order processes



[Vendor and Item Catalog](#)  
Maintain Vendors and Item Catalogs



[Inquiries and Reports](#)  
Purchase order inquiries and purchase order, requisition and catalog item usage reports



[Procurement Analysis](#)  
Perform 2-dimensional analysis of purchase orders and requisitions

[eProcurement Home](#)

The Buyer Station include the following **NEW** utilities:

- Managing purchase orders – search tool that facilitates the management (review and edit) of purchase orders.
- Requisition expeditor – workbench that makes possible manual online selection and sourcing of individual requisition lines to purchase orders.
- Quick Sourcer – process that allows the automatic creation of purchase orders from requisitions based on predefined parameters.
- Dispatch Purchase Orders – utilities to allow electronic transmission of purchase orders via XML.
- Procurement Analytics – graphs and charts for transactional analysis.

---

NOTE: Dispatch Purchase Orders (i.e. electronic XML dispatch) will not be used initially by the State of Indiana.

---

The Buyer Station also includes **LINKS** to core purchasing utilities:

- Purchase Order Processes – various processes used to create, dispatch, and reconcile purchase orders
- Approve change requests – review and approve change requests.
- Maintain vendor and items – manage vendors and items.
- Reports and Inquiries – delivered PeopleSoft reports and inquiries.

---

NOTE: These utilities are part of the core purchasing suite. The eProcurement buyer station only provides a central homepage from which these utilities can be accessed.

---

## MANAGING PURCHASE ORDERS

Manage Purchase Orders is a user friendly search tool that facilitates the management (review and edit) of purchase orders.



Select the icon from the buyer station.

### Manage Purchase Orders

Search by the following criteria :

<b>Purchase Order:</b>	<input type="text"/>	<b>Business Unit:</b>	<input type="text" value="00061"/>	<input type="button" value="Search"/>
<b>Vendor ID:</b>	<input type="text"/>	<b>Buyer:</b>	<input type="text"/>	<input type="button" value="Reset"/>
<b>Date From:</b>	<input type="text" value="08/05/2003"/>	<b>Through Date:</b>	<input type="text" value="08/12/2003"/>	

[Add New PO](#)      **Filter By:**       **Sort By:**

Attachments      P-card

Enter search criteria to find POs.


[Return to Buyer Station](#)

Using Manage Purchase Orders you can search for your purchase orders, review attachments or add/update purchase orders.

Click the [Add New PO](#) hyperlink to create a new Purchase Order. Refer to the purchasing training manual for details on how to use the Purchase Order component.

Select the [Return to Buyer Station](#) hyperlink to return to the buyer station.

### Searching

To begin, specify the search parameters in the search fields provided. Where applicable use the lookup icons  or drop down lists  to select from valid values.

---

NOTE: You can only select buyers for which you are authorized, in your user preferences. See your security administrator for more details.

---



Click [Search](#) or [Reset](#) to initialize your search or reset your search parameters, respectively.

Use the **Filter By:** [All](#) option to filter your search by purchase order status. The available statuses include; ALL, Approved, Dispatched, Open, Pending.

Use the **Sort By:** [PO Date](#) option to sort your search by PO Date, Buyer Name, PO ID, PO Status, Vendor ID.

## Reviewing Results

If your search returned results, you will be presented with the following grid.

Attachments

P-card

List of Purchase Orders

Customize | Find | View 100 | First 1-10 of 181 Last

PO Number	PO Date	Status	Buyer Name	Vendor	Vendor Name		
<a href="#">0003507419</a>	08/07/2003	Dispatched	KEVANS	0000007554	ROWESINDUS-001		
<a href="#">0004500107</a>	08/05/2003	Approved	BCULVER	0000055814	DELLAWINDO-001		
<a href="#">0003507379</a>	05/05/2003	Dispatched	Sharp,Linda-061	0000002420	AUTOMATEDM-001		
<a href="#">0003507380</a>	05/05/2003	Dispatched	Sharp,Linda-061	0000005900	MIDLANDCOO-001		
<a href="#">0003507359</a>	05/02/2003	Dispatched	Sharp,Linda-061	0000017780	COMMERCIAL-006		
<a href="#">0003507340</a>	05/01/2003	Dispatched	Sharp,Linda-061	0000053251	CLARKPRODU-001		
<a href="#">0003507313</a>	04/30/2003	Dispatched	Sharp,Linda-061	0000056464	BUSINESSCO-004		
<a href="#">0003507275</a>	04/29/2003	Dispatched	Sharp,Linda-061	0000002523	DELLMARKET-001		
<a href="#">0003507273</a>	04/28/2003	Dispatched	Sharp,Linda-061	0000002523	DELLMARKET-001		
<a href="#">0003507267</a>	04/28/2003	Dispatched	Sharp,Linda-061	0000002523	DELLMARKET-001		

Click on the applicable PO Number [0003507419](#) hyperlink to view the purchase order.

NOTE: You will be redirected to the core purchasing Purchase Order component. Refer to the purchasing training manual for details on the Purchase Order component.

Where applicable, click on the attachment icon  to view any file attachments.

## REQUISITION EXPEDITOR

Requisition Expeditor is a tool that allows an authorized buyer to review requisitions and source/stage them. Only approved requisitions, that have not already been sourced, will be available for processing.



### Requisition Expeditor

Manually assign a vendor to a requisition and create a purchase order

Select the


icon from the buyer station.


---

NOTE: The requisition expeditor utility replaces the need to use the Requisition Selection and PO Auto Source processes that exists in core purchasing.

---

### Requisition Expeditor



Enter Default Buyer Name:  

Search by the following criteria :

Business Unit:

Category:


Vendor:

Requisition ID:

Requester:

Enter search criteria to find Requisitions.

[Return to Buyer Station](#) [Process Monitor](#)

Select the default Buyer Name to use for creating the purchase order. Use the lookup icon  to select from a list of valid values.

Enter Default Buyer Name:  

---


NOTE: You can only select buyers for which you are authorized, in your user preferences. See your security administrator for more details.

---

Select the [Return to Buyer Station](#) hyperlink to return to the buyer station.

Select the [Process Monitor](#) hyperlink to go to the process monitor.

## Searching

To begin, specify the search parameters (as required) in the search fields provided. Where applicable use the lookup icons  or drop down lists **Business Unit:**  to select from valid values.

Click the **Search** push button to begin your search.

Click the **Reset** push button to clear your search parameters and start again.

## Reviewing Results

If your search returned results, you will be presented with the following grid and option.

Select All

Set Vendor

Vendor Name:

Deselect All

Sort By:

Requisition ID

List of Requisitions

Customize

Find

View All


First

11-20 of 73

Last

Select Reg	Select Vndr	Vendor	Req ID	Line #	Item Description	PO Qty	UOM	Price	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ICS-001	0000000517	2	Hair spray	1.0000	CS	14.28000	
<input type="checkbox"/>	<input type="checkbox"/>		0000000504	1	JKL:H	1.0000	EA	33.00000	
<input type="checkbox"/>	<input type="checkbox"/>		0000000501	1	DFSA	1.0000	EA	30.00000	
<input type="checkbox"/>	<input type="checkbox"/>	PENPRODUC	0000000497	1	Clothes-Ou	1.0000	DRU	67.50000	
<input type="checkbox"/>	<input type="checkbox"/>		0000000491	1	Test Bud	1.0000	EA	35.00000	
<input type="checkbox"/>	<input type="checkbox"/>	NICKLESBAK	0000000485	1	Hamburger	1000.00	PKG	0.92000	
<input type="checkbox"/>	<input type="checkbox"/>	MOTIVEPART-I	0000000481	1	Auto Parts	10.0000	EA	4.41000	
<input type="checkbox"/>	<input type="checkbox"/>	MOTIVEPART-I	0000000481	2	Auto Parts	10.0000	EA	7.39000	
<input type="checkbox"/>	<input type="checkbox"/>	MOTIVEPART-I	0000000481	3	Auto Parts	20.0000	EA	5.68000	
<input type="checkbox"/>	<input type="checkbox"/>	PARISHMANU	0000000480	1	Milk Bag L	10.0000	M	35.75000	
<input type="checkbox"/>	<input type="checkbox"/>		0000000208	1	VACATION	555.000	EA	3453.00000	


Use the Sort By drop down option to sort your results by the available options.

Requisition ID 

Category  
Due date  
Item Description  
Req. Amt.  
Requestor/Dept  
Requisition ID  
Vendor Name

Click on the item description [Hair spray](#) hyperlink to view details of the items.

Where applicable, click on the attachment icon  to view any file attachments.

Click the Suggested Vendor  icon to view the suggested vendor details as specified by the requestor.

**Suggested Vendor**

**Vendor Name:** BOB'S AUTOMOTIVE  
**Contact Name:** BOB

**Address Information**

**Country:** USA United States  
**Address Line 1:** DOWN THE STREET  
**Address Line 2:** 1111 MAIN STREET  
**Address Line 3:**  
**City:** KOKOMO  
**State:** IN **Postal Code:** 44444 Indiana

**Phone Information**

**Phone Type:** Business **Int'l Prefix:**  
**Telephone:** **Phone Extension:**  
**Comments:**



After reviewing the suggested vendor, you can override it with an existing vendor from the vendor master, or you can add the suggested vendor to the vendor master. See below for details on how to override a vendor for the requisition line.



---


NOTE: Contact DOA to add vendors to the vendor master.

---

The following table details the other options available to you.

Field	Icon	Description
PO QTY	<input type="text" value="1.0000"/>	The quantity of the item requested.  As an authorized buyer you can change the quantity before the PO is created
Vendor	<input type="text" value="COMFORTFOC"/> 	This is the vendor as defaulted from the item master.  If this is blank (i.e. for order by description) you will need to specify an applicable vendor. Use the lookup icon  to select from a list of valid values from the vendor master.  As an authorized buyer you can change the vendor as required.

Field	Icon	Description
Select Req	<input type="checkbox"/>	<p>Select the check box to select the requisition lines for which purchase orders should be created. You cannot change the requisition line when you select this check box.</p> <p>Note once you have selected the requisition lines you will be presented with additional options <b>Submit PO</b> and <b>View Staged PO</b> in the grid header. See below for more details.</p>
Select All	<b>Select All</b>	Select this push button to select all available/displayed requisition lines (see select req above) for which purchase orders should be created.
Deselect All	<b>Deselect All</b>	Select this push button to clear the select req check box for all available/displayed requisition lines.
Select Vendor	<input type="checkbox"/>	Select this check box to apply the vendor in the Vendor Name field when the Set Vendor button is used. See below.
Set Vendor	<b>Set Vendor</b>  Vendor Name: <input type="text"/> 	<p>Apply the selected Vendor Id against the requisition lines that are flagged using the select vendor check box above.</p> <p>Please note the order of processing is:</p> <ol style="list-style-type: none"> <li>1. Click the select vendor check box for applicable requisition lines.</li> <li>2. Specify an applicable vendor in the vendor name field. Use the lookup icon  to select from a list of valid values from the vendor master.</li> <li>3. Click the set vendor push button to apply the vendor.</li> </ol>
Submit PO	<b>Submit PO</b>	<p>Click this push button to initiate the process that will create purchase orders for the requisition lines that you have selected. (see the select req check box option above.</p> <p>Note the vendor must be assigned before a PO can be created</p>

Field	Icon	Description
View Staged PO		Click this push button to view staging information of purchase order that you intend to create.  Again you must select the requisition line, using the Select Req check box, before you can enter this page.





When you click the View Staged PO push button you will be redirected to the following page.

[Return to Summary](#)

**Staged Purchase Orders** Find | View All First 1 of 1 Last




Unit: 00061 Vendor Name: COMFORTFOO-001

**Lines / Schedules** Find | View All First 1 of 1 Last

1	Item ID:	000000000100000108	Due Date:	09/05/2003	
1	Price:	19.80000	Freight Trm:	FOB DEST	 FOB DESTIN
	Req Qty:	1.0000 PR	Ship Via:	VENDOR	 VENDOR
	Amount:	19.800 USD	Ship To:	061FORMS	 IDOA/Forms
	*Distribute by:	Qty			

**Distribution Detail** Customize | Find | View All | First 1 of 1 Last

tab1 tab2

Line	PO Qty	Amount	Pct	Location	Entry Event	*GL Unit	*Object
1	1.0000	19.800	100.0000	030GOV 		0006 	539900 

## QUICK SOURCER

Quick Sourcer is a process that allows a buyer to automatically create purchase orders from requisitions, based on user defined parameters. In essence Quick Sourcer achieves what Requisition Expeditor does but requires less manual intervention.



### Quick Sourcer

Automatically assign a vendor to a requisition and source from inventory or create a purchase order

Select the icon from the buyer station.

---

NOTE: The State of Indiana will schedule the Quick Sourcer process to run on an automated recurring cycle (i.e. daily) to automatically pickup and build fully approved QPA requisitions into purchase orders.

---

The first step is to create (or find and existing) a run control. Run controls are in essence a user defined grouping of parameters that are used to run processes. For more details refer to your PeopleSoft navigation training.

### Requisition Sourcer

Enter any information you have and click Search. Leave fields blank for a list of all values.



[Find an Existing Value](#) [Add a New Value](#)

**Search by:** Run Control ID begins with

☐ Case Sensitive

[Search](#) [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

### Autosource Parameters

Once you have added your run control, you will need to define the autosource parameters. These are in effect search parameters that the process utilizes, to identify which requisitions should be built into a purchase order.

Run Control ID: Tanman Test

[Report Manager](#)

[Process Monitor](#)

Run

[Return to Buyer Station](#)

Selection Criteria			
*Request Type:	Both	<input checked="" type="checkbox"/> Item ID Required	Origin: <input type="text"/>
Business Unit:	00061	To Business Unit:	00061
Requester:	<input type="text"/>	Req Selection	Req ID: <input type="text"/>
Vendor:	<input type="text"/>	<input checked="" type="radio"/> Specific	
Contract:	<input type="text"/>	<input type="radio"/> Range	
Buyer:	<input type="text"/>		
Category:	<input type="text"/>		
Date Selection			
*Option:	N	Operand:	<input type="text"/>
		Nbr Days:	<input type="text"/>
		Date:	<input type="text"/>

 Save

 Notify

[Autosource Parameters](#) | [Purchase Order Values](#)


Field Name	Description
Request Type	Select the type of requisition to build into a Purchase Order. Values include: <ul style="list-style-type: none"> <li>1. Inventory - process only the requisition lines for which the Inventory Source checkbox is selected. Note you can select the Inventory Source checkbox on the Items Definition page.</li> <li>2. Purch Ord (purchase order) - process only the requisition lines for which the Inventory Source checkbox is not selected.</li> <li>3. Both – process both types of requisitions.</li> </ul>
Item ID Required	Select to process the requisitions that have a valid item ID (i.e. QPA).
Business Unit (To)	Specify the agency for which requisitions should be sourced into a purchase order.
Requestor	Specify the Requestor ID for which the requisition selection should be limited.
Vendor	Specify the Setid and Vendor ID for which the requisition selection should be limited.
Contract	Specify the SetId and Contract ID for which the requisition selection should be limited.
Buyer	Specify the Buyer ID for which the requisition selection should be limited.
Category	Specify the SetId and Category ID (i.e. UN/SPSC) for which the requisition selection should be limited.






Field Name	Description
Requisition selection	Name specific requisitions (or a range of requisitions) to build into a purchase order.  This option is only available if you specify one from/to business unit (above).
Date Selection	Specify the date criteria to select the requisition lines.  <b>Option:</b> C: Current date. M: Current date minus number of days. N: No date selection criteria. P: Current date, plus number of days. S: Specified date.  <b>Operand</b> – logical operator for defining the date range i.e. equal to, or greater than the date in the Date field.  For example to select the next three days, select P in the Option field, <= in this field, and 3 in the Nbr Days (number of days) field.  <b>Nbr Days (number days)</b> – The number of days for the before, equal to, and after selection in the Operand field.  <b>Date</b> – specific date for selection. This is required when you select S in the Option field

## Purchase Order Parameters

### Purchase Order Values

Click on the  hyperlink to view the Purchase order values page. These are default values/options to be applied to the purchase orders being created.

[Return to Buyer Station](#)

PO Calculation Values			
Buyer:	<input type="text"/>		
*Consolidation Method:	<input type="text" value="V"/>		
Lead Time Factor %:	<input type="text"/>	Ship to Priority Factor %:	<input type="text"/>
Price Factor %:	<input type="text"/>	Vendor Priority Factor %:	<input type="text"/>
Origin:	<input type="text"/>	Purchase Order Date:	<input type="text"/> 
Purchase Order Reference: <input type="text"/>			
<input checked="" type="checkbox"/> Pre-Approve Vendor <input checked="" type="checkbox"/> Build PO's as Approved <input type="checkbox"/> Expedite Staged POs			
PO Build Values			
<input type="checkbox"/> Hold From Further Processing <input type="checkbox"/> Calculate PO Line Numbers <input checked="" type="checkbox"/> Allow Dispatch When Appr			

Field Name	Description
Buyer	Select the default buyer to use on the PO if none is specified on the requisition.
Consolidation Method	Determines if PO are consolidated by: <ul style="list-style-type: none"> <li>1. B - business unit, vendor, and buyer</li> <li>2. V - business unit and vendor only</li> </ul> Please note that consolidation only applies to those requisition lines marked for consolidation.
Lead Time Factor %, Ship to Priority Factor %, Price Factor %, and Vendor Priority Factor %	These fields are used for flexible sourcing. To override the category and item settings, enter the percentage weight that you want the PO_POCALC process to give the factor when the application process is evaluating vendors for flexible sourcing. The sum of these factors must be 100 percent.
Purchase Order Date	Specify a date for the PO. If blank the current system will be defaulted.
Purchase Order Reference	Enter a generic reference to be applied against all PO created by the process.
Pre-Approve Vendor	Automatically approve the use of vendors that the PO_POCALC process selects.
Build PO's as Approved	Builds PO into an approved status.
Expedite Staged POs	Select to source all requisitions that are located in the staging table.
Hold from Further Processing	Select to place PO created on hold and prevent further processing.
Calculate PO Line Numbers	Select to ignore staged entry line numbers. It creates sequential line numbers, beginning with 1.
Allow Dispatch When Approved	Select to mark PO eligible for dispatch.

## DISPATCH PURCHASE ORDERS



### [Dispatch Purchase Orders](#)

Dispatch and publish purchase orders

Click on the icon on the Buyer Station to utilize processes that publish purchase orders using XML format.

### PO DISPATCHER

#### [Dispatcher](#)

Dispatch purchase orders and stage them for publishing.

#### [Batch Dispatcher](#)

Dispatch purchase orders and stage them for publishing.

#### [Publisher](#)

Publish dispatched purchase orders.

#### [MarketPlace](#)

Dispatch MarketPlace items.

#### [Dispatch Message Log](#)

View error messages for the purchase order dispatch process.

#### [Publish Monitor](#)

Monitor application messaging.

#### [Process Monitor](#)

View the process monitor.

[Return to Buyer Station](#)

These processes are utilized when dispatching purchase orders by cXML (Dispatcher or Batch Dispatcher) or via MarketPlace (Publisher, MarketPlace, Dispatch Message Log, Publish Monitor).

---

NOTE: The State of Indiana will not be utilizing MarketPlace. The use of cXML purchase order will be enabled depending on the capabilities of vendors.

---

---

NOTE: See the 'Purchase Order Processes' section below for details on dispatching purchase orders via print, fax or email.

---

## PURCHASE ORDER PROCESSES



### [Purchase Order Processes](#)

Requisition sourcing and purchase order processes

Click on the  
PO processes.

icon on the Buyer Station to view links to core Procurement

### PO PROCESSES

#### [Requisition Selection](#)

Select requisitions for purchase order sourcing.

#### [PO Auto Sourcer](#)

Request process to automatically source purchase orders.

#### [Auto Requisition Selection](#)

Request process to create purchase orders from requisitions.

#### [Inventory Demand](#)

Run inventory demand.

#### [PO Calc](#)

Run purchase order calculations.

#### [PO Create](#)

Create purchase orders.

#### [Dispatch Purchase Orders](#)

Dispatch purchase orders via email, fax or printing.

#### [Change Purchase Order](#)

Run the batch change purchase order process.

#### [Notify Vendors of Attachments](#)

Notify Vendors of attachments for purchase orders

#### [Sourcing Workbench](#)

Analyze the sourcing staging tables.

#### [Requisition Reconciliation Workbench](#)

Requisition Reconciliation Workbench

#### [PO Reconciliation Workbench](#)

PO Reconciliation Workbench

#### [Purge Change Requests](#)

Purge the completed change requests.

#### [Purge Stage Tables](#)

Purge the stage tables based on your selection criteria.

#### [Reconcile Purchase Orders](#)

Run the reconcile PO process.

#### [Requisition Reconciliation](#)

Close requisitions that have been canceled or sourced, either from through a purchase order

#### [Process Monitor](#)

View the process monitor.

[Return to Buyer Station](#)

## INQUIRES AND REPORTS



### [Inquiries and Reports](#)

Purchase order inquiries and  
purchase order, requisition and  
catalog item usage reports

Click on the  
inquires and reports.

icon on the Buyer Station to view links to core Procurement

### Inquiries

#### [PO Inquiry](#)

Inquire on purchase order details.

#### [PO Activity Summary](#)

Inquire on purchase order activities.

#### [PO Change History](#)

Inquire on purchase order change history.

### Reports

#### [Expediting Report](#)

Provides purchase order details such as late days and due date sorted by  
buyer, vendor, or due dates.

#### [PO Listing Report](#)

Provides purchase order information sorted by purchase order date, vendor,  
buyer, or status.

#### [PO Status Listings](#)

Provides purchase order status information sorted by vendor or item.

#### [PO Detail Listings](#)

Provides detailed purchase order information sorted by purchase order date,  
vendor, or buyer.

**[PO Schedule Listings](#)**

Provides purchase order schedule information such as ship to and due date sorted by purchase order date, vendor, or buyer.

**[PO To Requisition Xref](#)**

Provides a cross reference between requisitions and the purchase orders created from those requisitions.

**[PO Item Category Usage](#)**

Provides purchase order item usage information by catalog or vendor.

**[Requisition To PO Xref](#)**

Provides information about selected requisitions and the purchase orders that were created from them.

**[Requisition Costing Summary](#)**

Provides GL business unit, account and department information summarized by requisition.

**[Requisition Cost Distribution Detail](#)**

Provides requisition cost distribution detail by business unit and date range.

**[Catalog Item Usage](#)**

Provides requisition item usage information for the specified catalog.

**[Receipt Summary](#)**

Provides receipt summary information.

**[Receipt Shipto Detail](#)**

Provides detail on receipt shipto.

**[Receipt Account Detail](#)**

Provides detail account information for receipts.

**[RTV Details](#)**

Provides detailed information for return to vendor.

**[RTV Credits](#)**

Provides information on return to vendor credits.

**[Match Exceptions](#)**

Provides matching exception information with voucher, purchase order, and receipt data.

**[Vendor Detail Listing](#)**

Provides a detailed vendor listing.

**[Vendor Summary Listing](#)**

Provides a summary vendor listing.

[Return to Buyer Station](#)

## APPROVE CHANGE REQUESTS



### [Approve Change Requests](#)

Review and approve change requests submitted by requesters

Click on the icon on the Buyer Station to use the approve change request function.

Requestors can make changes to their approved requisitions using the change request function. Once submitted change requests are routed to an authorized buyer for approval.

---

NOTE: If the unit price or quantity is increase then supervisor approval is also required.

---

Use this component to view and approve the change request.

[New Window](#) | [Help](#)

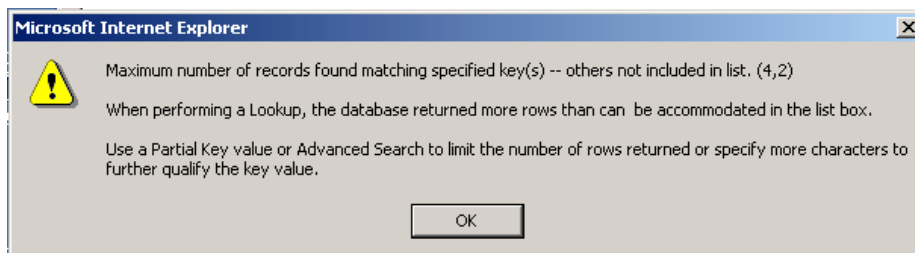
### Change Requests Pending Approval

Buyer:

No Change Request pending approval for any buyer.

[Return to Buyer Station](#) [Process Change Order](#)

You may get the following message if you are a super-user who has authority for more than 50 buyers:



This is a PeopleSoft message that indicates a large number of buyers have been loaded into the drop-down selection box. Click "OK" to continue.

Once the change request is approved a batch process is run to create a change order from the change request.

## VENDOR AND ITEM CATALOG



[Vendor and Item Catalog](#)

Maintain Vendors and Item Catalogs

Click on the icon on the Buyer Station to view links to core Procurement functions for maintaining vendors and items.

### Supplier & Item Catalog

#### [Maintain Vendors](#)

Maintain or create vendors.

#### [Maintain Items](#)

Maintain or create items.

[Return to Buyer Station](#)



## PROCUREMENT ANALYTICS



### [Procurement Analysis](#)

Perform 2-dimensional analysis of purchase orders and requisitions

Click on the . icon on the Buyer Station to use two dimensional graphs for transactional analysis of eProcurement requisition and purchase orders.

### Procurement Analysis

Select Graph:	PO Value Analysis		
Business Unit:	00061		
Buyer Name:		Vendor ID:	
By Amt/Qty:	Amount		
Analysis by:	Item Category		
Graph Type:	2D Bar	Graph	Reset

Enter search criteria and click Graph

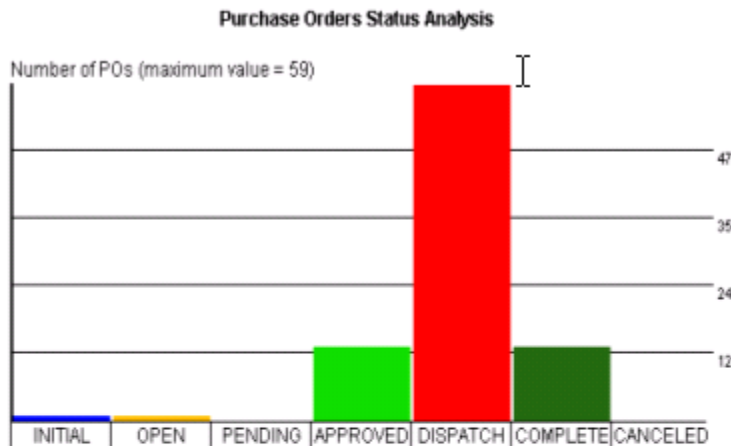
Following is a list of available graphs:

Graph Type	Description
PO Status Analysis	Provides information about the current state of your purchase orders by displaying the number of purchase orders in each PO status.
PO Value Analysis	Provides information about your total PO costs by item category or ship to location.
Requisition Status Analysis	Provides information about the current state of your requisitions by displaying the number of requisitions in each requisition status.
Value Frequency Analysis	Provides information about the frequency of large value purchase orders versus small value purchase orders by sorting the number of purchase orders within defined monetary ranges.

Following is a list of available field options. Note: depending on the graph selected, certain fields may not be available.

Field Name	Description
Business Unit	The PeopleSoft Purchasing business unit containing the requisitions or POs that are used to build the graph.
Vendor ID	Select a vendor ID to restrict the graph information to one vendor.
Buyer Name	Select a buyer name to restrict the graph information to one buyer.
Requester Name	Select a requestor name to restrict the graph information to one requestor.
Graph	Click to generate your transactional analysis graph.

Field Name	Description
Reset	Click to delete the entries on this page. Then you can enter new criteria for generating the next graph.



**PO Status**  
All values are displayed in number of POs.

Legend	
<span style="color: blue;">■</span>	INITIAL: 1
<span style="color: yellow;">■</span>	OPEN: 1
<span style="color: purple;">■</span>	PENDING: 0
<span style="color: green;">■</span>	APPROVED: 13
<span style="color: red;">■</span>	DISPATCH: 59
<span style="color: darkgreen;">■</span>	COMPLETE: 13
<span style="color: lightgreen;">■</span>	CANCELED: 0